

## **REPORT OF THE SCHOOL COMMITTEE AND BOARD OF SELECTMEN ON THE HARDY, HUNNEWELL AND UPHAM FACILITIES PROJECT**

Under Article 22 of the 2016 Annual Town Meeting, the School Committee and Board of Selectmen are seeking an appropriation of \$200,000 from Free Cash for the purposes of further enrollment and traffic studies and scenario refinement related to the facilities needs at the Hardy, Hunnewell and Upham elementary schools.

The enrollment and traffic studies and scenario refinements will be carried out by a new HHU Advisory Committee, which as of this writing is being created by the School Committee and Board of Selectmen. This committee will include Town board members, Town staff, parents and community members, and will use this additional study data to provide a recommendation to the School Committee and the Board of Selectmen on a master plan for Hardy, Hunnewell and Upham.

Upon this recommendation, the School Committee will select a master plan, and jointly with the Board of Selectmen move forward with a request for funding for the feasibility phase of the project, either at a Special Town Meeting in the fall of 2016 or at the 2017 Annual Town Meeting.

Both the School Committee and the Board of Selectmen are committed to continuing to engage with members of the Wellesley community to find a solution that: provides elementary students with modernized buildings that fit current educational standards; is fiscally responsible for the Town; is reasonably feasible to execute; takes into account future enrollment needs; and addresses other important considerations such as traffic and retaining the Town's successful, long-standing model of neighborhood schools.

The School Committee and the Board of Selectmen recognize that the recommendation of the School Facilities Committee has generated a significant community reaction, and is an emotional issue for many town residents. Ultimately, the Town will have to balance the data, analysis and fiscal considerations against the emotional and cultural issues surrounding the Town's current configuration of elementary schools.

### **Background**

The need for extensive repairs, renovations and/or reconstruction at Hardy, Hunnewell and Upham schools has been well documented. See: the Report of the School Facilities Committee in the *Advisory Report to the 2013 Special Town Meeting*, pages 46-49, as well as the *Advisory Report to the 2015 Annual Town Meeting*, pages 109-114.

All three buildings have major systems and modular classrooms that are at the end of their useful lives. Any renovations must also include the removal of hazardous materials, and given the age of the buildings significant updates will be required to bring the facilities up to current building code. In addition, the three buildings do not meet the current programming needs of the Wellesley Public Schools.

School	Educational Program Deficiencies
Hardy	Lacks appropriate SpEd/ELL and teacher work spaces. Lacks cafeteria space. Inadequate kitchen server space.
Hunnewell	Lacks appropriate SpEd and teacher work spaces. Lacks cafeteria space. Inadequate kitchen server space. Gym significantly undersized.
Upham	Lacks appropriate SpEd and teacher work spaces. Inadequate kitchen server space. Lacks cafeteria space. Total school capacity undersized for operational and programmatic effectiveness.

A 2012 study by architects Symmes Maini & McKee Associates (SMMA) detailed the deficiencies of Hardy, Hunnewell and Upham as well as needs at the Town's other school buildings. In early 2013, the School Facilities Committee (SFC) was assembled to conduct further analysis of the data provided by SMMA and the previous School Facilities Master Planning (SFMP) Task Force. The SFC conducted many open meetings over a period of more than two and one half years. These meetings were open to the public, and agendas and minutes are available on the Town website. The SFC reported to the School Committee and Board of Selectmen in televised, open meetings. Town Meeting was updated when funding was requested at the December 2013 Special Town Meeting and the 2015 Annual Town Meeting.

### **SFC Analysis and Recommendation for HHU**

Based on the significant needs at all three schools, the SFC began considering many potential scenarios, including:

- Major school renovations and the replacement of all modular classrooms at each school;
- Replacement of one school and renovation of the two others;
- Replacement and expansion of one school; renovation and the replacement of modulars at a second school or expansion of the second school; and closure of the third school.

Additionally, in 2013 the School Department contracted with Cropper GIS to develop forecasts based on Wellesley's demographics, historical trends, economic trends and real estate activity. The enrollment forecasts provided extensive data to the SFC as it considered how many classrooms, and therefore schools, would be needed. Peak elementary (K-5) enrollment was in 2008-09 with 2,481 students. Since that time, enrollment has declined to 2,307 students for the 2015-16 school year. The 2013 Cropper report extends through the 2023-24 school year, in which it forecasts an elementary enrollment of 1,994 students, a decrease of nearly 500 students from 2008-2009 and more than 300 students below current enrollment.

Despite this forecasted enrollment decline, the SFC judged that the Town should maintain capacity to handle some level of potential enrollment increase in the future. The SFC concluded that planning for an enrollment of 2,500 students, slightly greater than the 2008-09 peak, was prudent. Bates, Fiske, Schofield and Sprague can accommodate just over 1,600 students. The required capacity at HHU of 900 students corresponds to approximately 7 sections (classrooms) per grade level.

The SFC also determined that a three-section school (three classrooms per grade level) is the desirable **minimum** school size for several reasons: it is easier to balance class size; there is more flexibility with student placement; there is increased opportunity for collaboration and professional development with more teachers per grade; there are economies of scale in the construction of a school larger than 2 or 2.5 classrooms per grade (the current sizes of the Hardy, Hunnewell and Upham buildings); and there are operating cost efficiencies with larger school sizes. (Bates, Fiske, Schofield and Sprague are all three-section schools.)

After Town Meeting's approval of \$90,000 in funding at the December 2013 Special Town Meeting, the SFC reached an agreement with SMMA to assist in development of a master plan for HHU. By spring of 2014, the SFC began to see consolidation from three to two schools as desirable, based on the targeted minimum school size and the 2,500 total enrollment capacity.

By unanimous decision, Annual Town Meeting in 2015 appropriated an additional \$50,000 for further study of the possible renovation, reconstruction, addition, consolidation or replacement of the Hardy, Hunnewell and Upham schools.

The SFC considered various options developed by the SMMA through the spring of 2015 and consulted with BETA Inc. regarding traffic considerations if the Town were to consolidate elementary schools. Given the location of Hunnewell School south of major traffic chokepoints, the SFC concluded that closing that school would be problematic.

After further consideration of both traffic challenges, particularly on Weston Road, and of the town's natural boundaries (including Route 9, Washington Street and railroad tracks), the SFC developed its recommendation:

- Build a new, 4-section school (528 student capacity) behind the current Upham School while continuing to occupy the existing building and temporarily relocate students as necessary to vacate Hunnewell.
- Renovate and expand Hunnewell from its current 2.5 sections (15 classrooms/330 students) to 3 sections (18 classrooms/396 students).
- Close Hardy and redistrict into the six remaining schools.

As part of this process, the SFC developed a map of conceptual school districts to ensure that a viable redistricting configuration was feasible. The resulting map produced districts that fell largely within the Town's natural boundaries, and were very similar to the school districts that existed in Wellesley from 1982 to 2002, when the Town had six neighborhood schools.

The SFC voted 8-0 to recommend this option. Voting members of the SFC in August 2015 were: Judy Belliveau, WPS Assistant Superintendent; Sharon Gray, School Committee; Tom Goemaat, community member; Matt Kelley, School Committee and SFC chair; Hans Larsen, Executive Director; David Lussier, Superintendent; Joe McDonough, Facilities Maintenance Director; and Jack Morgan, Board of Selectmen. This recommendation was presented at a series of public forums beginning in September 2015.

#### **HHU Parent Advisory Committee (HHU PAC)**

For the School Committee, the SFC community forums marked the transition from the SFC's analysis of available options to seeking wider community input on those options, prior to making any decision. Recognizing the level of concern from many town residents, particularly in the Hardy community, the School Committee created the HHU Parent Advisory Committee, consisting of parent representatives from each elementary school and PAWS.

*The charge of this committee was to provide a recommendation to the School Committee for a comprehensive town-wide solution to facility needs at Hardy, Hunnewell and Upham based on School Committee guidelines and previous School Facilities Committee work.*

The committee included parent representatives chosen by the PTOs of Bates, Fiske, Hardy, Hunnewell, Schofield, Sprague, Upham and PAWS. This 15-member committee met seven times, with most of the meetings continuing for three hours or more. Meetings were open to the public and several were recorded by Wellesley Public Media for later viewing. Every meeting but

the first was facilitated by Wellesley resident Lisa Hicks, whose work has involved group facilitation with education stakeholders for more than 20 years.

HHU PAC members reviewed data, information and potential scenarios developed by the SFC, as well as additional three-school scenarios developed by SMMA in response to requests from members of the community. The final meeting of the HHU PAC was held on January 21, 2016. All 15 members agreed upon a list of guiding principles for School Committee:

- Any solution must include a clear plan for swing space that minimizes disruptions to students, faculty and staff. The plan should include identification of swing space, student placement plans and transportation plans.
- A new enrollment study should be performed to provide the most accurate, up-to-date projections, ideally using multiple or different methodologies.
- The solution should provide for more flexibility relative to the ebbs and flows of enrollment year to year and ensure capacity for future needs in order to limit redistricting in the future.
- Preserve the town-wide concept of neighborhood schools.
- In order to ensure community buy-in, the process should be transparent to all town citizens, and especially to those most affected (whether through closure, rebuilding, or redistricting). Methods could include forums for community input, more broad communication of open meetings and other grass roots efforts.
- If the final recommendation is to close a school, recognize the emotional impact of the decision. In addition, emphasize the importance of maintaining the building and/or fields as a community asset and make efforts to get a commitment from the town that they will remain as such.
- Provide a recommendation that the School Committee is most confident will be supported town-wide, and balances the educational needs of Wellesley's students with being fiscally responsible to the taxpayers in Wellesley.
- Revisit the traffic impact to the neighborhoods surrounding all affected schools, including the impact of closing the school, of opening a larger school at an existing location, and additional ways to alleviate traffic issues around the affected schools.

In addition, the HHU PAC members agreed to vote on three different recommendations to School Committee. The group did not come to a consensus, although two-thirds supported consolidation of some form into six schools if the Cropper forecasts are determined to be accurate. The results were as follows:

- Accept the SFC Recommendation as drafted: **Yes – 3, No – 9, Abstain – 3**
- Subject to feasibility enrollment study corroborating current projections, support consolidation and closing a school with additional data to determine which school: **Yes – 7, No – 4, Abstain – 4**
- Support continuing efforts to find a seven-school solution: **Yes – 4, No – 8, Abstain – 3**

Detailed individual statements from each of the 15 members are available to read at [wellesleyma.gov/HHU](http://wellesleyma.gov/HHU), as are the voted guiding principles and minutes from each of the HHU PAC meetings. The School Committee would like to thank Ms. Hicks for her service as moderator, and the parent representatives for their thoughtful and dedicated work.

### The Options

In all, six different options were seriously considered and reviewed by either the SFC and/or the HHU PAC. The table below describes each of the six options, including their estimated cost to the Town, resulting capacity, projected life span of the buildings and a summary of the

construction plan. These construction plan summaries illustrate the complexity of the project and the difficulty of creating suitable classroom space for students while construction is ongoing.

## HARDY, HUNNEWELL, UPHAM – OPTIONS OVERVIEW

Option No.	Description	Resulting Elem. Capacity	Bldg. Lifespan	Construction Plan	Estimated Cost Per SMMA <sup>1</sup>
3	<ul style="list-style-type: none"> <li>• <b>New Hardy</b> – 4 sections, 528 students</li> <li>• <b>Renovation/addition to Hunnewell</b> – 3 sections, 396 students</li> <li>• <b>Close Upham</b></li> </ul>	2,530 students, 115 sections	50 years	Build new Hardy at rear of site while operating old Hardy (18 months); Move Hunnewell students into new Hardy; Renovate Hunnewell (18 months); Open Hunnewell & redistrict into 6 schools; Demolish non-historic part of old Hardy	\$91M
5	<ul style="list-style-type: none"> <li>• <b>New Upham</b> – 4 sections, 528 students</li> <li>• <b>Renovation/addition to Hunnewell</b> – 3 sections, 396 students</li> <li>• <b>Close Hardy</b></li> </ul>	2,530 students, 115 sections	50 years	Build new Upham at rear of site while operating old Upham (20 months); Move Hunnewell students into new Upham, Renovate Hunnewell (18 months); Open Hunnewell & redistrict into 6 schools; Demolish old Upham	\$96M
7A	<b>Repairs Only</b> to existing Hardy, Hunnewell, Upham	2,508 students, 114 sections (same as current)	25 years	Install modulars at one or more elementary schools or Town site to house up to 330 students (3 years) - <b>OR</b> - locate rental space usable as school; Repair schools in unspecified order (12 months each); Repairs/Code compliance only - no upgrades or improvements to interior or sites; No or limited redistricting	\$64M
8	<ul style="list-style-type: none"> <li>• <b>New Upham</b> - 2 sections, 264 students</li> <li>• <b>“Mostly New” Renovated Hardy</b> - 2.33 sections, 308 students</li> <li>• <b>Renovation/addition to Hunnewell</b> - 2.5 sections, 330 students</li> </ul>	2,508 students, 114 sections (same as current)	50 years	Build new Upham at rear of site while operating old Upham (20 months); Move Upham students into new Upham; Move Hardy students into old Upham plus 3 temporary modular classrooms; Renovate Hardy (18 months); Move Hardy students into “mostly new” Hardy; Move Hunnewell students into old Upham; Renovate Hunnewell (18 months); Move Hunnewell students into renovated Hunnewell; Demolish old Upham; No or very limited redistricting	\$116M
9	<ul style="list-style-type: none"> <li>• <b>New Upham</b> - 2.5 sections per grade, 330 students</li> <li>• <b>“Mostly New” Renovated Hardy</b> - 2.5 sections per grade, 330 students</li> </ul>	2,596 students, 118 sections	50 years	Build new Upham at rear of site while operating old Upham (20 months); Move Hardy students into new Upham; Renovate Hardy (18 months); Move Hardy students into “Mostly New” Hardy; Move Hunnewell	\$126M

<sup>1</sup> Assumes construction start date of fourth quarter of 2018, except for Scenario 7A, which would begin construction in third quarter of 2019. Full reports available at [wellesleyma.gov/hhu](http://wellesleyma.gov/hhu).

	<ul style="list-style-type: none"> <li>• <b>Renovation/addition to Hunnewell</b> - 2.5 sections per grade, 330 students</li> </ul>			students into new Upham; Renovate Hunnewell (18 months); Move all students into finished buildings; Demolish old Upham; Moderate redistricting	
10	<ul style="list-style-type: none"> <li>• <b>New Upham</b> - 3 sections per grade, 396 students</li> <li>• <b>"Mostly New" Renovated Hardy</b> - 3 sections per grade, 396 students</li> <li>• <b>Renovation/addition to Hunnewell</b> - 3 sections per grade, 396 students</li> </ul>	2,794 students, 127 sections	50 years	Build new Upham at rear of site while operating old Upham (20 months); Move Hardy students into new Upham; Renovate Hardy (18 months); Move Hardy students into "Mostly New" Hardy; Move Hunnewell students into new Upham; Renovate Hunnewell (18 months); Move all students into finished buildings; Demolish old Upham; Moderate redistricting	\$140M

While the North 40 was considered as a potential site for a new building, its proximity to Hardy also made it clear that the decision would be a choice between building on the North 40 or at Hardy, as having two schools in such close proximity, in a high traffic area, did not make sense.

There was initial thought that building on the North 40 would provide advantages over building at Hardy, in terms of reduced constraints and potentially in reduced costs, but SMMA determined there was no significant advantage to building on the North 40 instead of Hardy. The Town's traffic consultants concluded that traffic issues at the North 40 would be at least as challenging as at Hardy. In addition, with approximately half of the town elementary students living north of Route 9, the SFC concluded it would be undesirable to locate a new school further south along Weston Road.

One side effect of this determination is that it leaves the North 40 open to other uses the Town might choose for it, decisions that can be made on a schedule of the Town's choosing, rather than being forced to act quickly to address the urgent needs at Hardy, Hunnewell and Upham.

### Next Steps

The new HHU Advisory Committee will focus on two key areas, enrollment and traffic, before refining the analysis of scenarios and making a recommendation to the School Committee and the Board of Selectmen.

## Enrollment and School Size

Future enrollment is a critical consideration in determining whether to consolidate from seven elementary schools to six. It helps to think about future enrollment, future capacity, and how many students might end up at each school as enrollment declines. As earlier outlined, the SFC, the School Committee and the WPS administration have supported a three-section school as the minimum preferred school size. However, if all seven elementary schools remain open at their current sizes and enrollment declines as forecasted in the 2013 Cropper report<sup>2</sup>, all Wellesley elementary schools are likely to fall below a full three-section school by the 2023-24 school year. Hardy, Hunnewell and Upham all would fall to two sections (264 students) or fewer. In 2015-16, Upham has 11 classrooms; with the Cropper decline, it likely would fall to 10 classrooms.

<sup>2</sup> Thus far, enrollment is declining slightly faster than forecasted by Cropper. See: WPS FY16 Enrollment Report, October 1, 2015, at <http://www.wellesleyma.gov/hhu>.

If enrollment declines as forecasted in the Cropper report, by the 2023-24 school year, enrollment at each of the elementary schools will be notably lower than today. The following table shows the projected enrollment at each elementary school, assuming redistricting were performed to balance capacity throughout the district.

School	Capacity	Enrollment	% Utilized
Bates	418	332	79
Fiske	374	299	80
Hardy	308	246	80
Hunnewell	330	264	80
Schofield	396	316	80
Sprague	418	332	79
Upham	264	211	80
<b>Totals</b>	<b>2,508</b>	<b>2,000</b>	<b>80</b>

Alternatively, if the projected enrollment were consolidated to six schools, those six schools would all be similar in size to the schools today.<sup>3</sup> Again assuming redistricting to balance capacity, enrollments would be as shown in the following table.

School	Capacity	Enrollment	% Utilized
Bates	418	331	79
Fiske	374	296	79
Schofield	396	313	79
Sprague	418	330	79
Renovated School	396	313	79
New School	528	417	79
<b>Totals</b>	<b>2,530</b>	<b>2,000</b>	<b>79</b>

In this scenario, numbers across the district are more balanced, and the cost to the Town to complete the modernization of its elementary schools is significantly less than with rebuilding/renovating all three schools. Additionally, this scenario would capture approximately \$500,000 in annual operational savings that would result from closing a school. These savings would include the salary and benefits costs associated with positions that would be eliminated, including a principal, secretary, nurse and librarian. There would also be some savings due to improved energy efficiency resulting from upgraded building envelopes and systems.

The appropriation under Article 22 would include funding for updating the Cropper forecast, as well as contracting with a second firm to provide an additional demographic and enrollment study, if the HHU Advisory Committee should deem it advisable.

### Traffic

With this appropriation, the HHU Advisory Committee also would have sufficient funding for a detailed traffic study that might include (but not be limited to) the impact on traffic throughout the Town of all options, including potential modifications to surrounding streets. All scenarios may be examined at forecasted enrollments as well as at maximum capacities of the buildings. The

<sup>3</sup> 2015-16 enrollment: Bates 391, Fiske 342, Hardy 309, Hunnewell 272, Schofield 368, Sprague 398, Upham 227.

HHU Advisory Committee would need to develop and provide the traffic study firm with potential redistricting options for each of the scenarios.

### **Refinement of Scenarios**

Based on the enrollment forecasts, traffic studies, public input and the deliberations of the HHU Advisory Committee, one or more of the current options may be refined. The appropriation will provide funds for cost estimation or other consultant support for any such refinements. The HHU Advisory Committee will be charged with then recommending a final option.

Respectfully submitted,

#### **School Committee**

Matt Kelley, Chair  
Wendy Paul, Vice Chair  
Anthony Bent  
Sharon Gray  
Patti Quigley

#### **Board of Selectmen**

David Murphy, Chair  
Marjorie Freiman, Vice Chair  
Ellen Gibbs  
Jack Morgan  
Barbara Searle